

Dräger Medical
Information Technologies



Saturn User's Guide

Part Number: 4115610-002
Rev: A
Date: 21 June 2002
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Report Manager

Software Versions 2 through 4

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1

Introducing Report Manager

This section introduces you to the Report Manager application.

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What Is Report Manager?

Report Manager is a software application that lets you generate standard reports for time studies, drug studies, and quantitative studies. Each study enables you to generate reports for specific periods of time. The reports can be printed, saved to a report template file, or exported for later display in a word processor, spreadsheet, or browser.

Note: It is the system administrator's responsibility to establish the level of security and training to ensure the authenticity, integrity, and confidentiality of the generated reports.

Time Studies	Time studies generate reports based on events entered during a case in Recorder (see "Recorder" below for more information). Times can be correlated to specific procedures, surgeons, anesthesiologists, anesthesia types, ASA physical status numbers, or operating room numbers.
Drug and Fluid Studies	Drug and fluid studies generate reports based on drugs and fluids entered during a case in Recorder. Drugs and fluids can be correlated to procedures, anesthesiologists, anesthesia types, or ASA physical status numbers.
Quantitative Studies	Quantitative studies generate reports based on the number of procedures performed, types of anesthesia, ASA physical status, and charge items. These numbers can be correlated to surgeons and anesthesiologists.
A Windows NT and Windows 2000 Application	Report Manager operates on personal computers under the Microsoft® Windows NT® and Windows 2000® operating systems. If you have experience using Windows NT, Windows 95®, or Windows 2000®, you will find that the application works much like any other Windows-based application. Administrators and users will also find many familiar Windows features on the Report Manager interface.
Installation	Report Manager can be installed on any nonclinical workstation configured as part of the Saturn Information System. Because it accesses data from the server database, it does not require a local database. Note: If the remote database access capability has not been installed, the Report Manager will indicate an error and terminate.
Part of the Saturn Information System	Report Manager is part of the larger Saturn Information System. Saturn also includes the Recorder, List Manager, Environment Manager, and Case Manager applications.
Recorder	Recorder is a software application for the anesthesia clinician to use in documenting the perioperative anesthesia process. The application provides easy data entry and access, as well as a means to record and store data collected automatically throughout the process.
List Manager	List Manager enables you to create and tailor the lists that the anesthesia clinicians use in Recorder and Environment Manager, such as lists of drugs, events, procedures, and surgeons. List Manager also enables you to create categorical lists that group the list items into clearly defined categories (e.g., lists under the Drugs list could be Narcotics, Reversal, Induction, and Cardiac).

Environment Manager	Environment Manager enables you to configure Recorder options and save them as an “environment” using a unique name (e.g., a type of procedure, a clinician’s name, etc.). When an environment is selected for use while Recorder is running, Recorder reads and uses that environment’s configuration options for that session. The configuration options consist of templates (groupings of drug, event, fluid, vital, charge, and lab lists), defaulted items entered into a case, and the case settings.
Case Manager	Case Manager enables you to delete and restore patient case files that are created in the Saturn Recorder application.

What’s New in Report Manager

Report Manager allows you to export report files to more file formats:

- Acrobat Format (PDF)
- Character-Separated Values
- Comma-separated values (CVS)
- Crystal Reports (RPT)
- Crystal Reports 7.0 (RPT)
- Data Exchange Format (DIF)
- Excel 5.0, 7.0, 8.0 (Extended also)
- HTML 3.2 and 4.0 (DHTML)
- Lotus 1-2-3 (WK1, WK3, WKS)
- ODBC (ASA 7.0 Client Sample; Local; Local Server; MQIS; Periopdm)
- Paginated Text
- Record style (column, no spaces or with spaces)
- Rich Text (Exact) Format
- Tab-separated text, Tab-separated values
- Text
- Word for Windows document
- XML

Where Do I Use Report Manager?

You can use Report Manager on any PC or workstation in your hospital that is connected to the information systems network and meets certain minimum hardware requirements. Report Manager is configured on a nonclinical workstation and runs as a stand-alone application.

The Network

Because Report Manager operates in a network environment with a centralized database, you can access and update your report data from any workstation or PC that is part of the network. Figure 1-1 illustrates a typical network. Note that some of the workstations are connected to anesthesia machines or monitors. Note also that all of the workstations are connected to the central Saturn database through the network. The Saturn database is ODBC-compliant and therefore supports SQL queries.

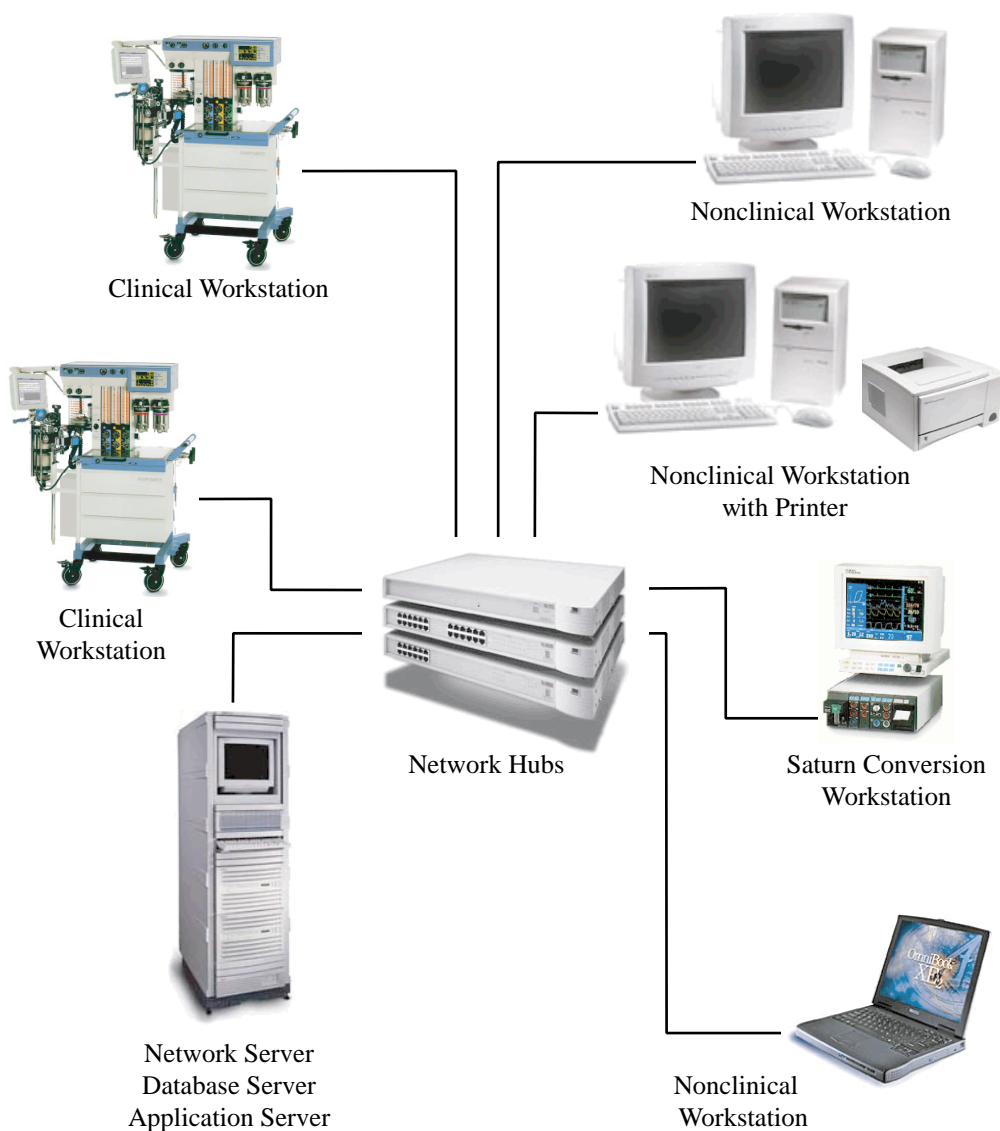


Figure 1-1. The Report Manager Network

How Do I Use This Manual?

This manual explains how to use the Report Manager application.

Manual Organization

The manual is organized sequentially to mirror the steps you might take in a typical situation. However, because no user or situation is truly typical, you can skip around in both the application and the manual.

Conventions

This manual uses standard typographical and keyboard conventions to help you interpret the information presented. These conventions are described in the following table.

Table 1-1. Typographical and Keyboard Conventions

Convention	Used For	Example
Arial Type	Window controls, such as entry boxes, menu options, and toolbar buttons.	In the Last box, enter the patient's last name.
Small Capitals	Keyboard keys.	To display a menu, press the ALT key, then the underlined letter in the menu name.
Italics	A generic data description, for which you or the system substitutes a specific value.	Enter the time in <i>hh:mm</i> format.
Monospace Type	Messages displayed by the system.	If you receive the message Case in Use , the case is already open.
Comma (,) between key names	Keyboard keys that you press one after the other. (Press the first key and release it. Then press the second key and release it.)	To display the File menu, press ALT, F.
Plus sign (+) between key names	Keyboard keys that you press simultaneously. (Press the first key and, while holding it, press the second key. Then release both keys.)	Press the TAB key (SHIFT+TAB to move backward) until the button is highlighted.

1

Introducing Report Manager

2

Learning the Basics

This section describes common elements of the Report Manager interface and explains how to use them.

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Definitions

This section describes terms that are used throughout this manual.

Table 2-1. Definition of Terms

Term	Definition
Report	A summary and/or detail presentation of information which is gathered from many cases and then presented on the display, printed to a printer, or stored in a file.
Report Description	<p>A report configuration that describes the rows, columns, headings, groups, and sorting that comprise a report. Each file contains:</p> <ul style="list-style-type: none"> • A specific set of database tables and columns that contain the data that will be used to produce the report • The selection, sorting, and grouping criteria that will be applied to the data • The format specifications for the visual appearance of the finished report <p>Prepackaged Draeger report description files created by a report developer (Crystal Reports) are included.</p>
Report Template	<p>A collection of settings that modifies a report description at run time. You can specify filters and ranges to be included in the report data when you generate the report.</p> <p>The original Draeger report description file is not modified by the report template. Report templates use .srf as their file extension when you save them. They can be saved in any directory that you can access on the network for which you have security clearance.</p>
Settings	Report options that specify date ranges, list subsets, output styles, and data source.
Data Source	The perioddm database ODBC source. This source is configured at installation time to refer to a remote Saturn database server.

The Report Manager Interface

Report Manager's graphical user interface uses the same basic Windows elements as the Saturn Recorder application. See also Learning the Basics in the Saturn Recorder User's Guide.

Main Window

When Report Manager is running, its Main window is displayed. If a report is open, it is contained in the Main window. However, if no reports are open, the Main window remains empty, as shown in Figure 2-1.

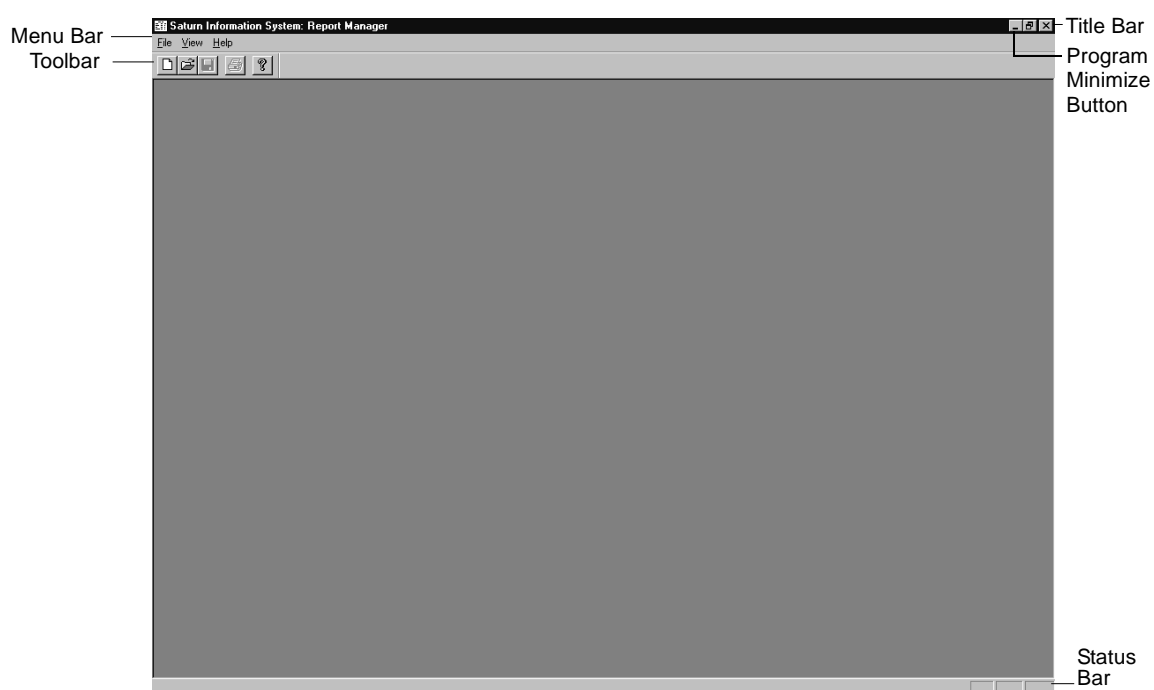


Figure 2-1. Main Window, No Reports Open

Main Window Features

Because the Main window is always open, its title bar, menu bar, toolbar, and status bar are always available to you.

Title Bar

The title bar identifies the Report Manager application (Figure 2-1). If a report template is open, the title bar also includes the name of the template. The Minimize/Maximize/Close button in the title bar operates the same way as in any Windows-based application.

Menu Bar

The menu bar contains individual menus that you can open. Each open menu contains options that you can choose to initiate an action (Table 2-2 on page 2-5). For example, some of the options on the File menu include creating a new report template or opening an existing one.

When no report templates are open, the Main menu bar is displayed (Figure 2-2). It contains three menus: File, View, and Help. These menus are all you need to create or modify report templates.

A screenshot of the main menu bar with three items: 'File', 'View', and 'Help'. Each item has a small horizontal line underneath the first letter, indicating it is a menu item.

Figure 2-2. Main Menu Bar (No Open Reports)

When a report template is open, the Report Manager menu bar replaces the Main menu bar (Figure 2-3). The Report Manager menu bar contains the same menus available when no report is open (File, View and Help), plus the Window menu.

A screenshot of the Report Manager menu bar with four items: 'File', 'View', 'Window', and 'Help'. Each item has a small horizontal line underneath the first letter, indicating it is a menu item.

Figure 2-3. Report Manager Menu Bar (Report Open)

Note: Menu items preceded by an asterisk (*) are only displayed after a report template is opened.

Table 2-2. Report Manager Menu Options

Menu Name	Menu Item	Description
File	New	Creates a new report template.
	Open	Displays a list of all existing report templates and enables you to open a report template.
	* Close	Closes the open and selected report template.
	* Save	Existing Report: saves the opened and selected report template to any directory for which you have security clearance and access on the network. New Report: displays the Save Report dialog box.
	* Save As	Displays the Save Report dialog box and saves the opened and selected report template (with a user-specified name) to any directory for which you have security clearance and access on the network.
	* Print	Displays the Print dialog box and enables you to print the opened and selected report template's contents to the selected printer.
	* Print Preview	Provides you with a preview of opened and selected report template's contents.
	Recent File	Opens the most recent file that was closed.
	Exit	Exits the Report Manager application.
View	Toolbar	Displays the toolbar.
	Status Bar	Displays the status bar.
* Window	Cascade	Arranges windows to overlap.
	Tile	Arranges windows without overlapping.
Help	About Report Manager	Displays the About Report Manager dialog box that provides release version and copyright information.

Choosing a Menu Item

Use the method in Table 2-3 to choose or select a menu item according to your input device.

Table 2-3. Choosing a Menu Item

Input Device	Method
Mouse	On the menu bar, click a menu name to display the menu. Then click a menu item.
Keyboard	<p>To display a menu, press the ALT key and then the key that corresponds to the underlined letter in the menu name (i.e., ALT, F for File menu). When the menu appears, do one of the following:</p> <ul style="list-style-type: none"> Press the UP or DOWN ARROW key to highlight an item, then press the ENTER key. Or, Press the key that corresponds to the underlined letter in an item name. <p><i>Example:</i> You want to choose the New option on the File menu. Press ALT and then F (ALT, F) to display the File menu. Then, either press the N key, or highlight New and press ENTER.</p> <p><i>Note:</i> Some menu items have keyboard accelerators which allow you to skip the steps in the above example. Instead, to open a new report template, press its accelerator (CTRL+N). If a menu item has a keyboard accelerator, it is shown on the menu to the right of the menu option.</p>

Toolbar

The toolbar (Figure 2-4) is located just beneath the menu bar. The buttons on the toolbar duplicate the functionality of various menu selections. They give you ready access to functions that you use frequently or need to implement quickly, such as opening another report template. Some of the toolbar buttons are always available for use, whereas others are available only when a report template is open. Buttons that are available, or are active, have dark text and graphics. Buttons that are not available, or are inactive, have light text and graphics.



Figure 2-4. Toolbar

Pressing a Toolbar Button

Use the method in Table 2-4 that corresponds to your input device.

Table 2-4. Pressing a Toolbar Button

Input Device	Method												
Mouse	Click the button.												
Keyboard	<p>All toolbar buttons are duplicated as items on various menus, where you can select them using the keyboard (see Table 2-3 on page 2-6). Many of these menu items also have keyboard shortcuts (pressing ALT and the underlined letter) and accelerator keys, which allow you to repeat a function without exiting and reentering (i.e., pressing CTRL and the underlined letter of the menu item).</p> <p>For example, if you wanted to create several new files, you would press ALT, F, N. Instead of closing the new file and then opening another file using Alt, F, N, you could use the accelerator keys (CTRL+N) to open another new file.</p> <table> <tr> <th>Toolbar Button</th><th>Menu Item/Keyboard Shortcut/Accelerator Keys</th></tr> <tr> <td>New</td><td>File:<u>N</u>ew/ALT F, N/CTRL+N</td></tr> <tr> <td>Open</td><td>File:<u>O</u>pen/ALT F, O/CTRL+O</td></tr> <tr> <td>Save</td><td>File:<u>S</u>ave/ALT F, S/CTRL+S</td></tr> <tr> <td>Print</td><td>File:<u>P</u>rint/ALT F, P/CTRL+P</td></tr> <tr> <td>About</td><td>Help:<u>A</u>bout Report Manager/ALT, H, A</td></tr> </table>	Toolbar Button	Menu Item/Keyboard Shortcut/Accelerator Keys	New	File: <u>N</u> ew/ALT F, N/CTRL+N	Open	File: <u>O</u> pen/ALT F, O/CTRL+O	Save	File: <u>S</u> ave/ALT F, S/CTRL+S	Print	File: <u>P</u> rint/ALT F, P/CTRL+P	About	Help: <u>A</u> bout Report Manager/ALT, H, A
Toolbar Button	Menu Item/Keyboard Shortcut/Accelerator Keys												
New	File: <u>N</u> ew/ALT F, N/CTRL+N												
Open	File: <u>O</u> pen/ALT F, O/CTRL+O												
Save	File: <u>S</u> ave/ALT F, S/CTRL+S												
Print	File: <u>P</u> rint/ALT F, P/CTRL+P												
About	Help: <u>A</u> bout Report Manager/ALT, H, A												

Status Bar

The status bar contains general status information, such as the status of the NUM LOCK, CAPS LOCK, and SCROLL LOCK keys. It also displays a line of text explaining the box, list or area of the screen that is pointed to, or selected.

2

Learning the Basics

Report Window

When you create or open a report template, a report window is displayed inside the Main window. The window is comprised of two areas. On the left is the Tree Control area, which contains the three Report Types and their descriptions in alphabetical order. On the right is the Settings area and the buttons you use to modify, generate, view and customize the template, as shown in Figure 2-5.

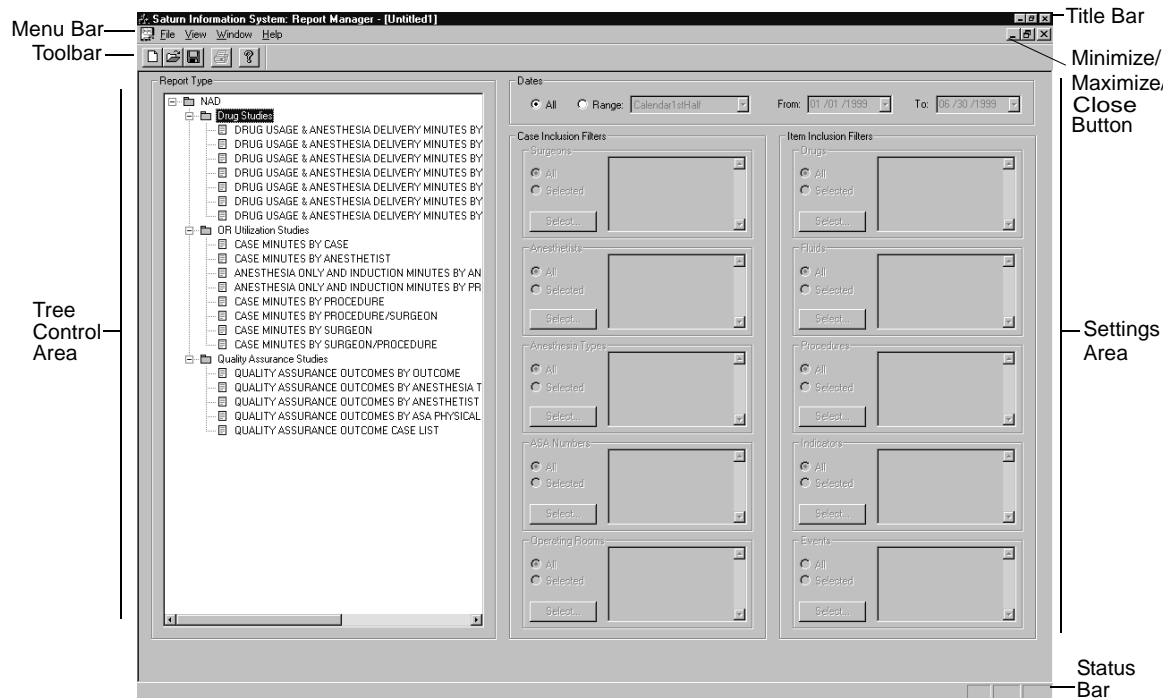


Figure 2-5. Report Window

Report Window Features

Report Manager allows several Report windows to be opened in the Main window at the same time. Each Report window has its own title bar, section tabs, and a data area for working with report templates. The Main window maintains the toolbar that is used by all of the open report templates.

Displaying a Report Description

When you point the cursor to a report description (i.e., report name) that is partially hidden, the entire name of the report description appears momentarily with an off-white background (Figure 2-6). When you select a report description, the settings that can be configured for that report are enabled and displayed in bold type in the Settings area.

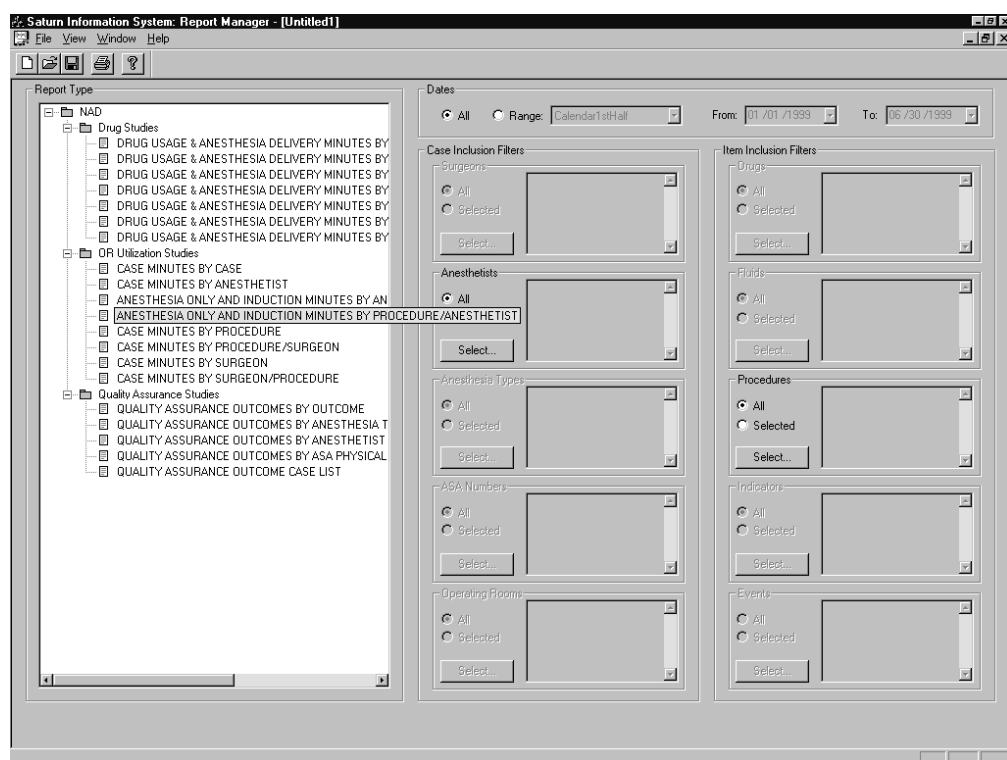


Figure 2-6. Displaying the Entire Report Name

Selecting a Report Template

When you select a report description, the report name appears highlighted (Figure 2-7). The settings that can be configured for that report template are enabled and appear in bold type in the Settings area. The settings that do not apply to this template are dimmed.

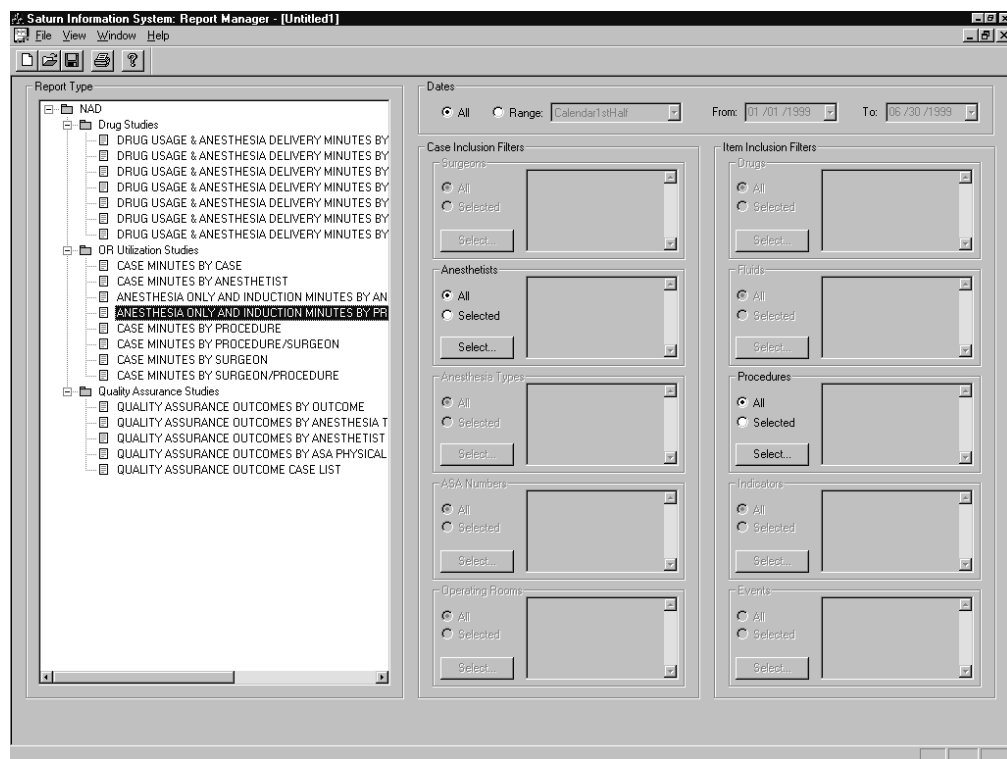


Figure 2-7. A Report Selected in the Tree Control Area

In the example in Figure 2-7, the OR Utilization Studies report that is highlighted in the tree control area is “Anesthesia Only And Induction Minutes By Anesthetist/Procedure.” The only settings that are “active” for this template are Anesthetists (in the Case Inclusion Filters column) and Procedures (in the Item Inclusion Filters column). You can modify the template settings by pressing the Select buttons. The dialog boxes associated with the settings are provided at the end of this section.

Minimizing Open Report Templates

When you minimize a report template by selecting the Minimize button on the report window title bar (Figure 2-8), it shrinks to an icon just above the status bar. Click the Maximize button on the icon to re-display a minimized template.

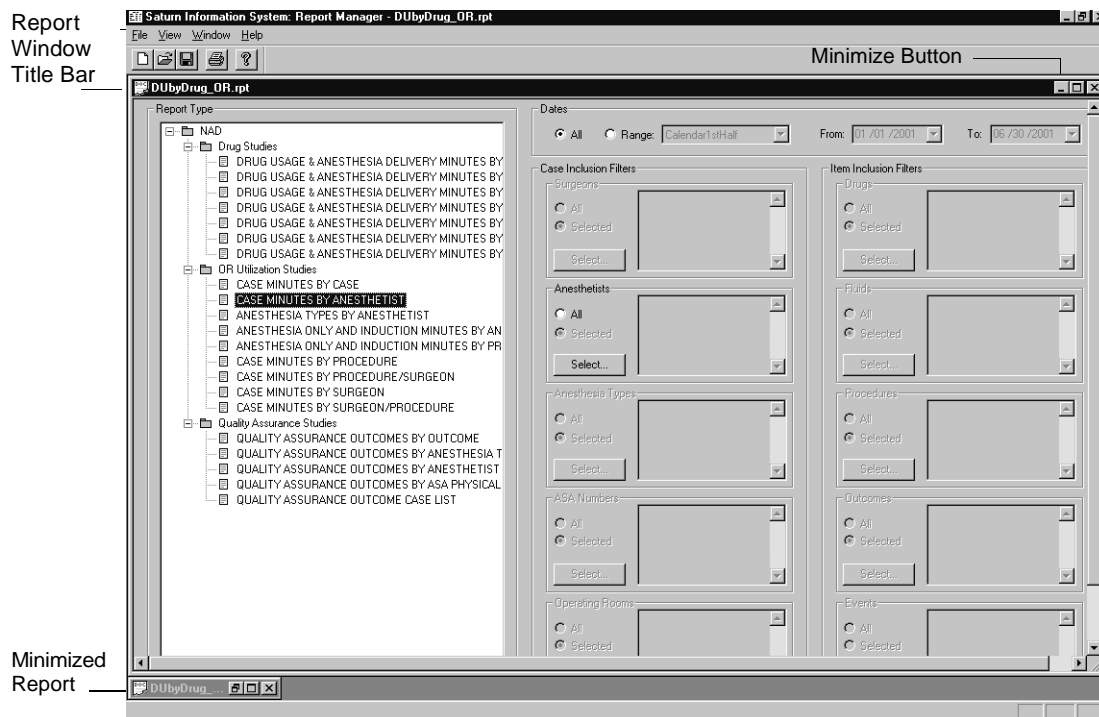


Figure 2-8. Minimized Reports

Tile Reports

If you open several report templates, they are displayed initially one on top of another. However, if you select Tile from the View menu, the templates appear as shown in Figure 2-9.

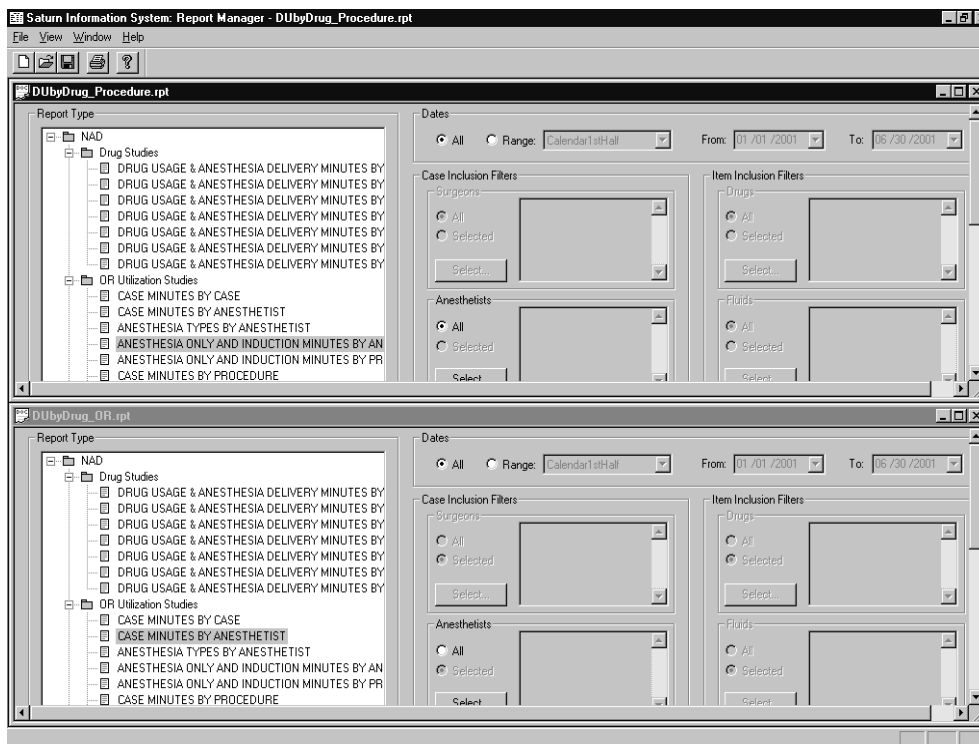


Figure 2-9. Tile Reports

When you minimize a tile report template, it shrinks to an icon above the status bar (Figure 2-8 on page 2-11). However, the icon may not be visible if other templates are open. If you want to maximize that report template again, you must select Tile from the Window menu for its icon to reappear.

Cascade Reports

When you select Cascade from the Window menu, multiple report templates appear as shown in Figure 2-10. Simply click the title area of the template you want to appear in the forefront.

Note: Reports that were minimized before selecting the Cascade option will appear as icons above the status bar. You must maximize each one and then select Cascade from the Window menu if you want them to appear as shown in Figure 2-10.

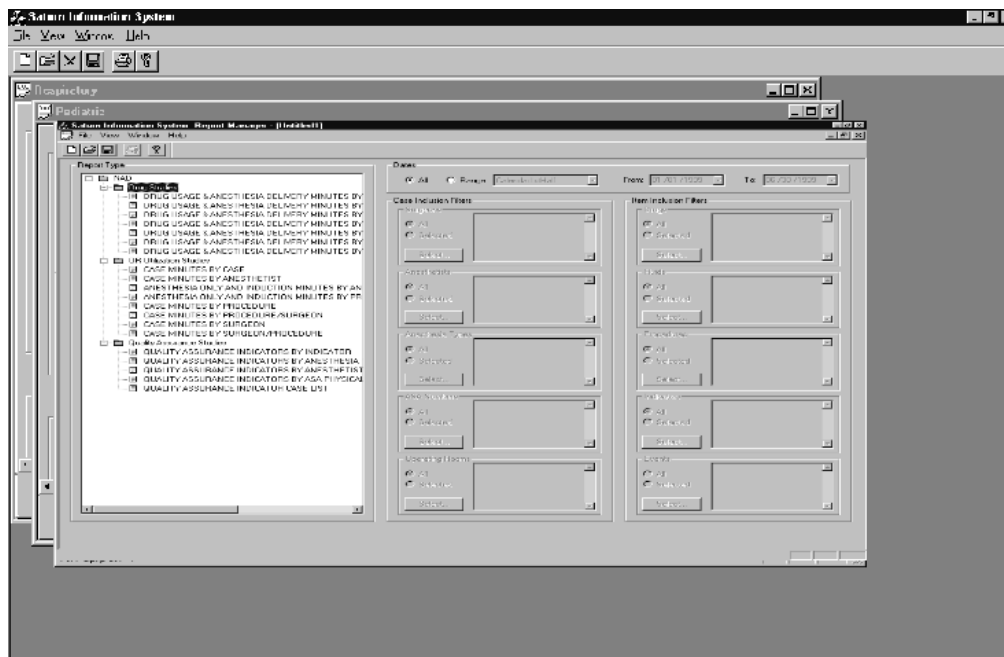


Figure 2-10. Cascade Reports

Below are some general guidelines when opening and viewing several reports:

- When you minimize a report (cascade or tile), it appears at the bottom of the Report Manager Main window. (If the icon is not visible, select Tile or Cascade from the Window menu and it will reappear.) Click the Maximize button on its icon to re-display it on the screen.
- You may need to select Cascade or Tile again for the Minimize/Maximize buttons to reappear on that report's window; then you can minimize it again, or close it without exiting the program.
- To recover other opened but minimized reports, select Tile from the View menu. The report icons appear above the status bar.
- Press a report's Close button (Figure 2-5 on page 2-8) to close the report template without exiting from the Report Manager program.

2

Learning the Basics

Settings Area Dialog Boxes

Each section of the Settings Area contains a Select button that displays a dialog box containing the list of available items that can be selected for that report. The lists you see when pressing the Select button are created in the List Manager program. Dialog boxes associated with each template follow.

Note: The guidelines for selecting items in the section below applies to all select dialog boxes.

Selecting Dialog Box Items

The Select Drug(s) dialog box (Figure 2-11) displays the list of all available drugs that were configured in List Manager. This list also appears in the Add Drug dialog box in the Recorder program.

When selecting items for a report, select the boxes of the items you want checked. If there are tabs in the dialog box (i.e., Induction, Narcotics, etc.), each tab displays its own list. Select all the check boxes of the items you want included in the report.

Note: When you select items in the All tab, the items are automatically selected in the other tabs in the dialog box. Likewise, when you select items in other tabs in a dialog box, the items are automatically selected in the All tab.

Or, you can find an item by typing its full or partial name in the speed search field. As you type, the letters appear in the speed search field and the items beginning with the letters you typed (i.e., *bu* in Figure 2-11) are listed.

Note: There is no insertion point in the speed search field. Just begin typing on the keyboard and the letters appear.

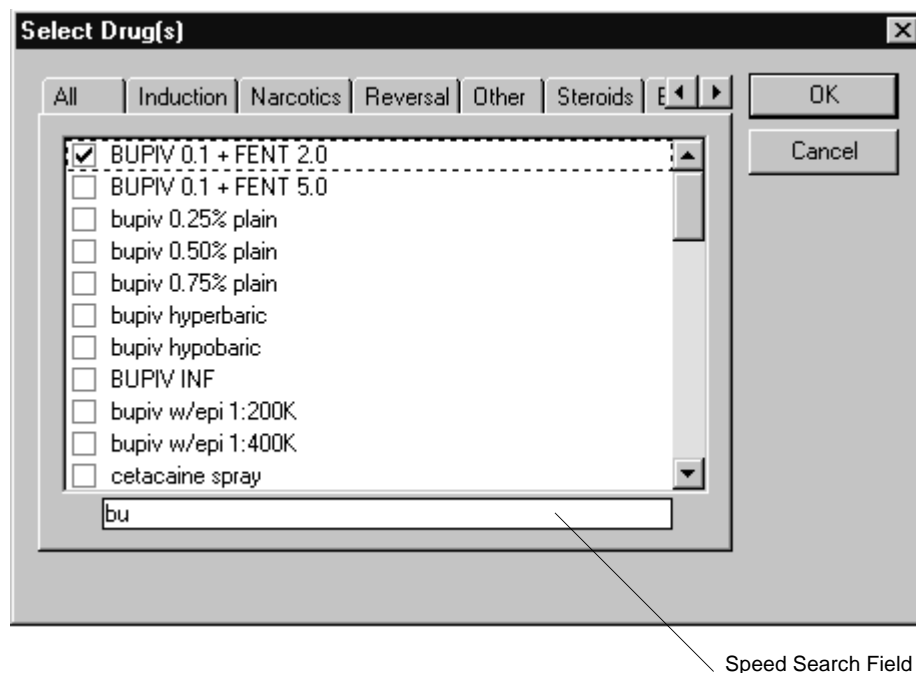


Figure 2-11. Select Drug(s) Dialog Box ("All" Tab Shown)

Example: When you select an item in the All tab, the item is selected automatically in the other tab(s) where it is listed. In the example in Figure 2-11, "BUPIV 0.1+FENT 2.0" is automatically checked in the "Local Anesthetic" tab, as shown in Figure 2-12.

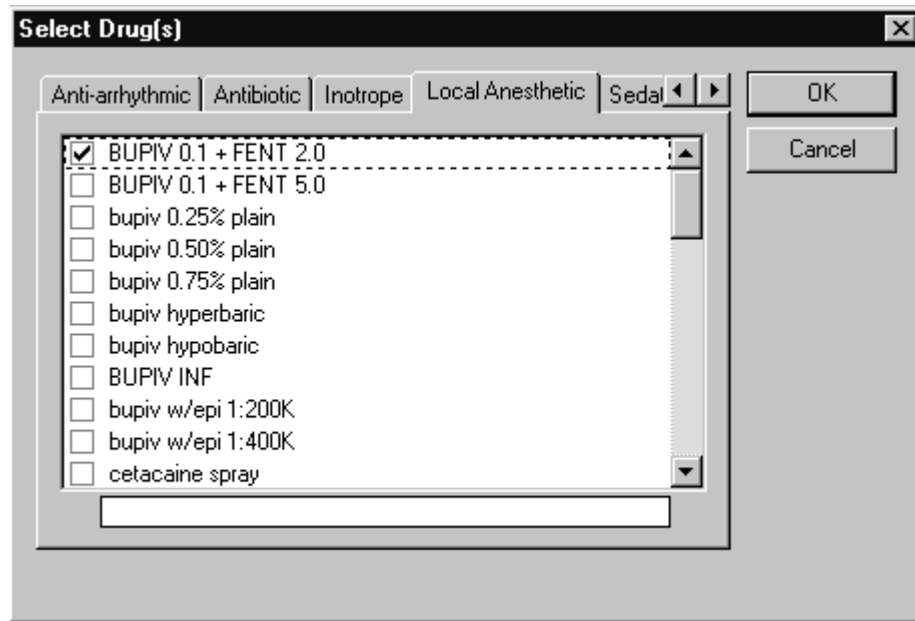


Figure 2-12. Selecting Items in the All Tab Automatically Selects Them in Other Tabs

2

Learning the Basics

Select Surgeon(s) Dialog Box

The Select Surgeon(s) dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By Surgeon
- Case Minutes By Procedure/Surgeon
- Case Minutes By Surgeon
- Case Minutes By Surgeon/Procedure
- All Quality Assurance Studies reports

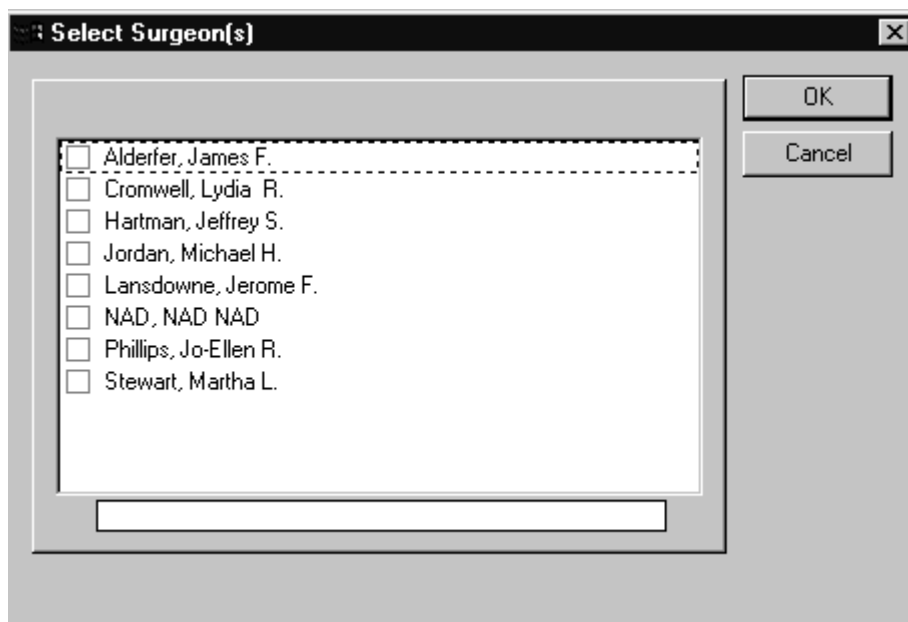


Figure 2-13. Select Surgeon(s) Dialog Box

Select
Anesthetist(s)
Dialog Box

The Select Anesthetist(s) dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By Anesthetist
- Case Minutes By Anesthetist
- Anesthetist Types By Anesthetist
- Anesthesia Only and Induction Minutes By Anesthetist/Procedure
- Anesthesia Only and Induction Minutes By Procedure/Anesthetist
- All Quality Assurance Studies reports

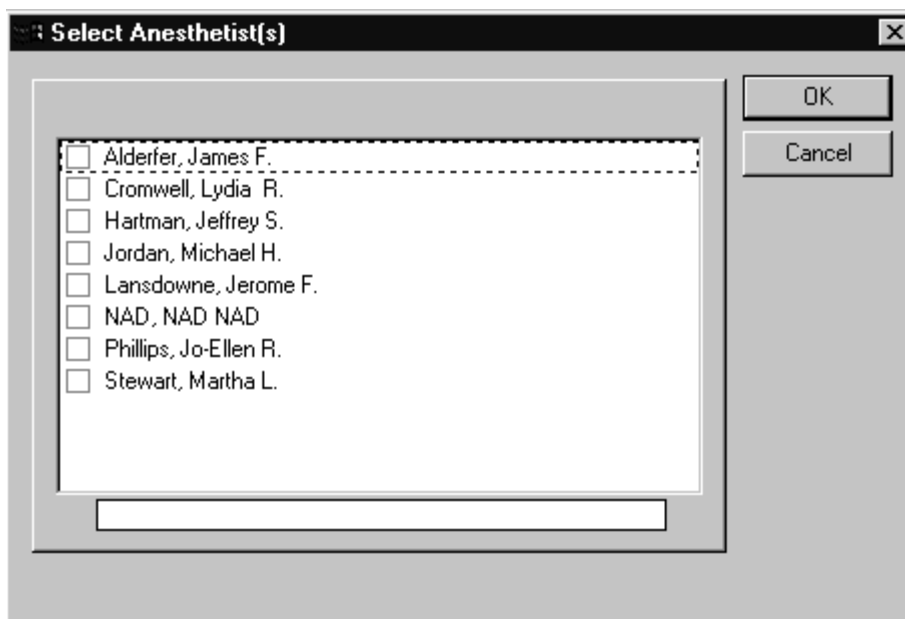


Figure 2-14. Select Anesthetist(s) Dialog Box

2

Learning the Basics

Select Anesthesia Type(s) Dialog Box

The Select Anesthesia Type(s) dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By Anesthesia Type
- Anesthesia Types By Anesthetist
- All Quality Assurance Studies reports except for Quality Assurance Outcome Case List

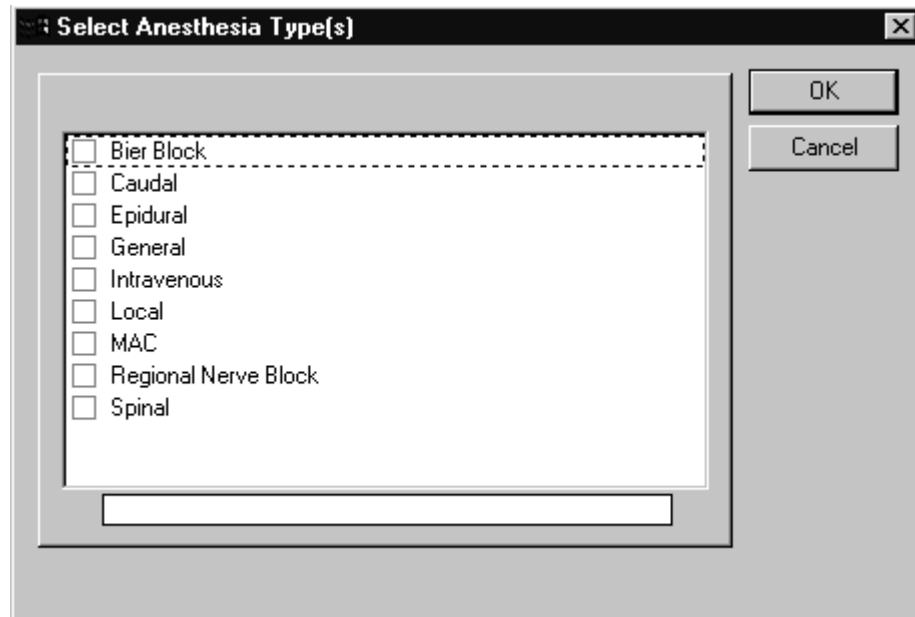


Figure 2-15. Select Anesthesia Type(s) Dialog Box

Select ASA
Numbers
Dialog Box

The Select ASA Number(s) dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By ASA Physical Status
- Case Minutes By Case
- All Quality Assurance Studies reports except for Quality Assurance Outcome Case List

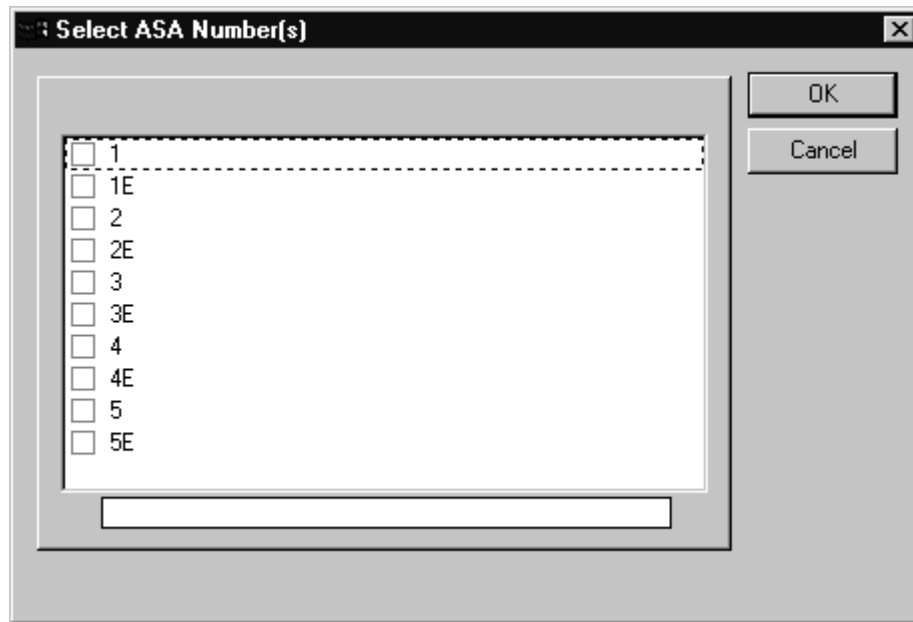


Figure 2-16. Select ASA Number(s) Dialog Box

2

Learning the Basics

Select
Operating
Room(s)
Dialog Box

The Select Operating Room(s) dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By Operating Room
- Case Minutes By Case

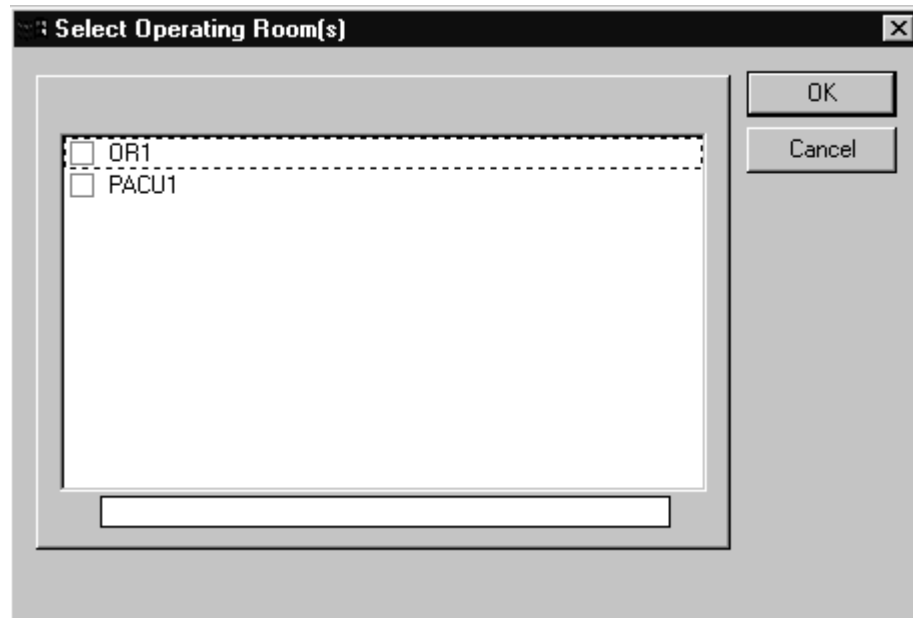


Figure 2-17. Select Operating Room(s) Dialog Box

Select Drug(s)
Dialog Box

The Select Drug(s) dialog box is available when running these reports:

- All Drug Studies reports

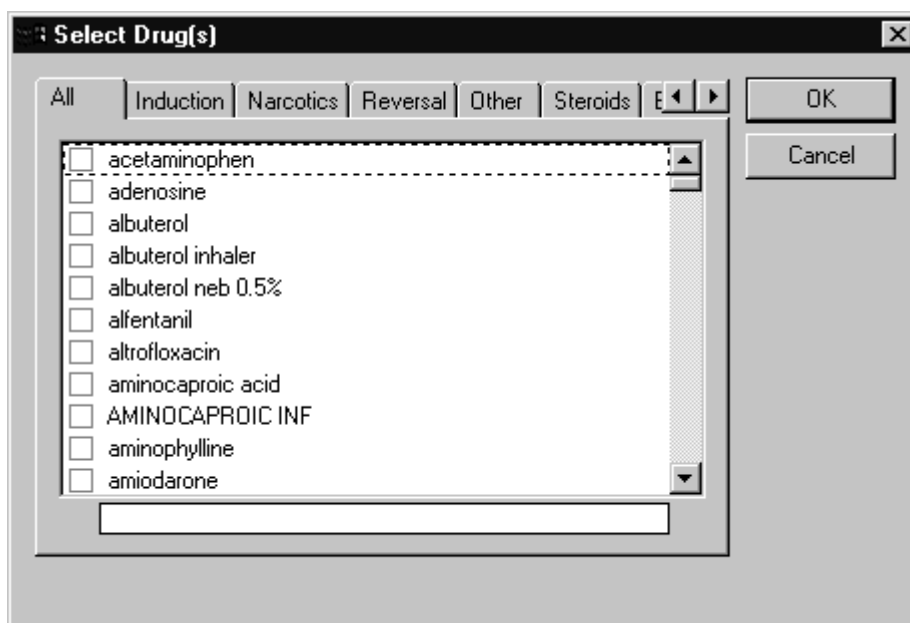


Figure 2-18. Select Drug(s) Dialog Box

Select Fluid(s)
Dialog Box

The Select Fluid(s) dialog box is not currently available for use, but will be activated in a future release.

2

Learning the Basics

Select Procedure Dialog Box

The Select Procedure dialog box is available when running these reports:

- Drug Usage & Anesthesia Delivery Minutes By Drug Sorted By Procedure
- Anesthesia Only and Induction Minutes By Anesthetist/Procedure
- Anesthesia Only and Induction Minutes By Procedure/Anesthetist
- Case Minutes By Procedure
- Case Minutes By Procedure/Surgeon
- Case Minutes By Surgeon/Procedure
- All Quality Assurance Studies reports

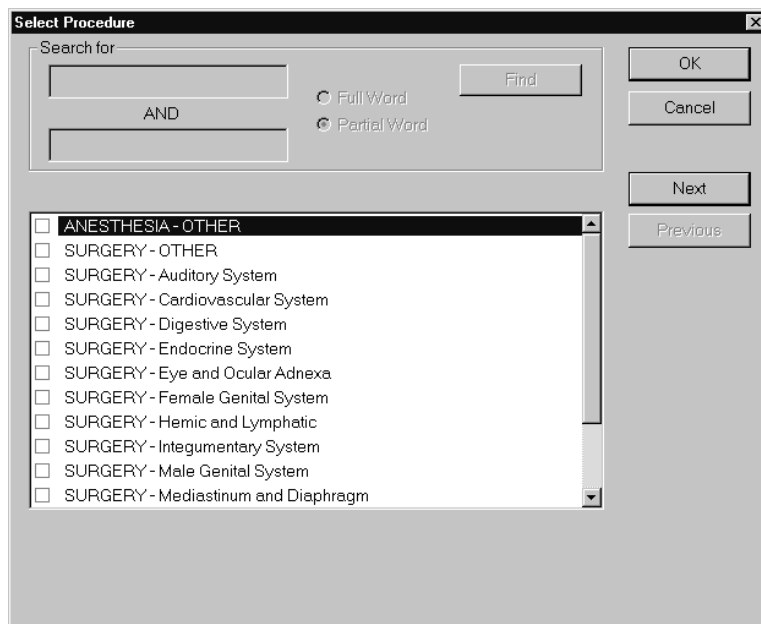


Figure 2-19. Select Procedure Dialog Box

Select
Outcome(s)
Dialog Box

The Select Outcome(s) dialog box is available when running these reports:

- All Quality Assurance Studies reports

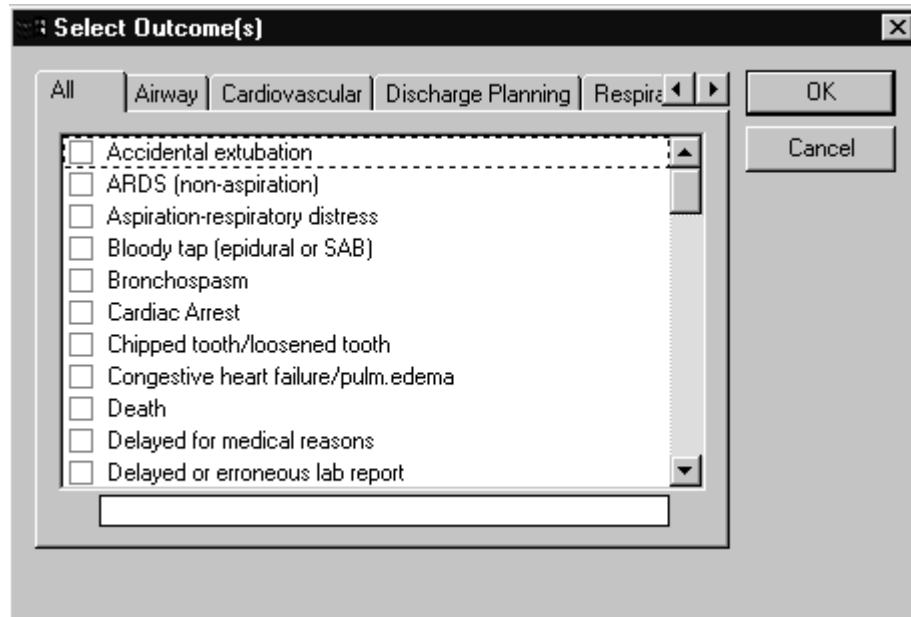


Figure 2-20. Select Outcome(s) Dialog box

Select Event(s)
Dialog Box

The Select Event(s) dialog box is not currently available for use, but will be activated in a future release.

2

Learning the Basics

3

Starting Report Manager

This section discusses security issues that affect your access to Report Manager, as well as how to start and log on to Report Manager.

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Access to Report Manager	3-2
Starting Report Manager	3-2

Saturn Logon Security

The Saturn Information System ensures that only authorized personnel are able to access the Report Manager application.

Access to Report Manager

Logon security controls access to Report Manager. The system administrator assigns a user ID and an initial password to each person authorized to use Report Manager. Only users with a recognized ID and password combination can log on to Report Manager.

Starting Report Manager

Before you can use Report Manager, you must log on. The logon process ensures that only authorized users can access the application.

Prerequisite

You must be an authorized Report Manager user and have a valid user ID and password. The password is case sensitive, so make sure you know which letters are uppercase and which are lowercase.

Procedure

Follow these steps to log on to Report Manager.

1. To start Report Manager, follow the procedure for the input device you are using:

Mouse	Double-click the Report Manager icon on the Windows NT desktop.
Keyboard	With the ARROW keys, select the Report Manager icon on the Windows NT desktop, and then press the ENTER key.

The Logon dialog box appears (Figure 3-1).

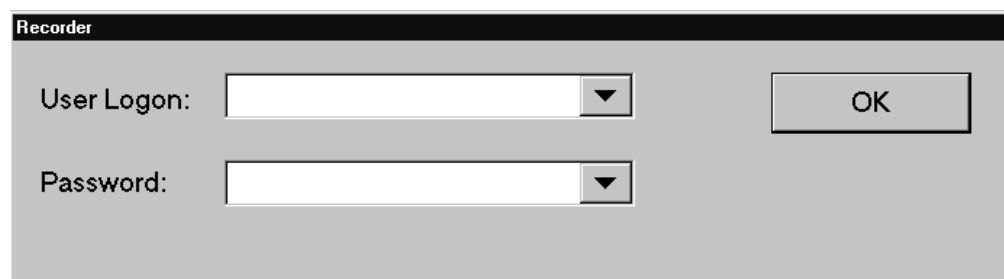


Figure 3-1. Logon Dialog

2. In the User Logon box, select or type your user name.
3. In the Password box, type your password. Make sure to type all letters in the correct case. For security purposes, asterisks (*) are displayed instead of the password that you type.
4. Press the OK button. The Report Manager Main window appears (Figure 3-2 on page 3-3). You are logged on to Report Manager.

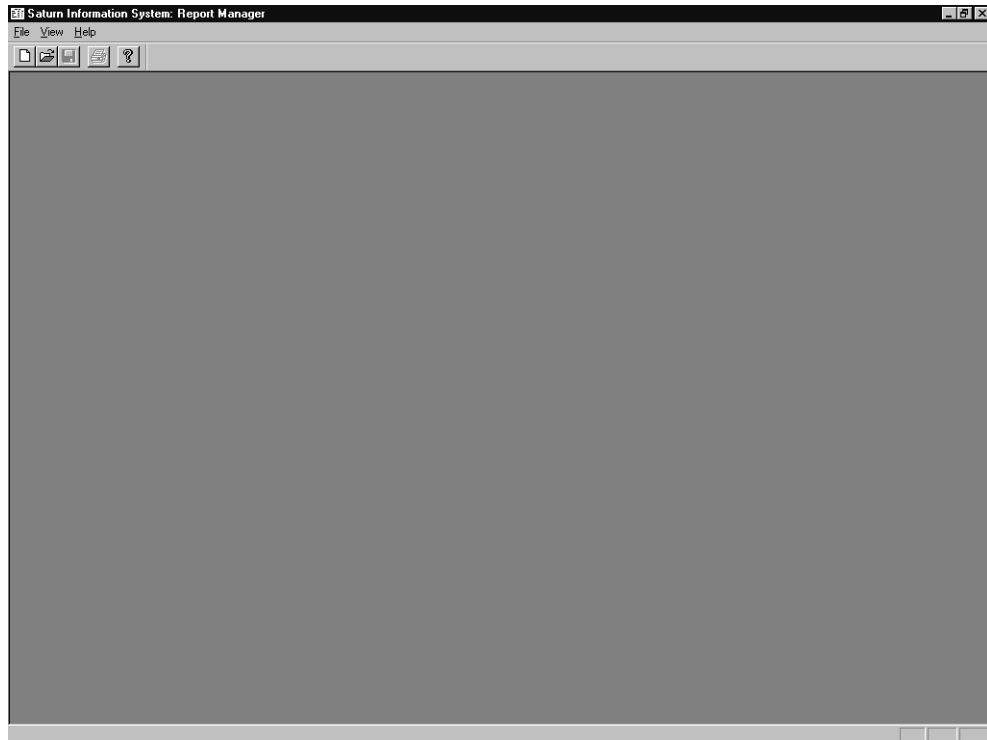


Figure 3-2. Report Manager Main Window (No Descriptions/Templates Selected)

3

Starting Report Manager

4

Creating Templates and Generating Reports

This section explains how to create new report templates and modify existing ones. Procedures for generating, printing, saving and deleting reports are also provided.

Creating a New Template	4-2
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Creating a New Template

When generating reports, you can use a report template that already has been created and saved (see *Modifying an Existing Template* below), or you can create a new template.

If you select **New** from the **File** menu or the toolbar, Report Manager opens a blank report template and presents a list of the available *report description files* in the **Report Type** window (the presentation resembles the hierarchical structure of Windows Explorer). Each of these files represents a type of report that you can run. The files are preconfigured and supplied by Draeger Medical, Inc. One description file can be selected at a time.

When you select a description file, certain settings for that description file are made active in the **Settings** area of the Report Manager window. (These settings are the actual parameters of the template for this particular report.) Some settings enable you to customize them further (i.e., choosing individual surgeons instead of accepting the “All” default).

After you select a description file and customize it (create the template), you can save the new template, display the report (print preview), export and save the report to another file format, or print the report without saving the template.

Modifying an Existing Template

You can open a previously saved report template by selecting **Open** from the **File** menu (or the toolbar) and use it to generate a report. A previously saved report template can be modified and saved to any directory that you can access on the network for which you have security clearance. Or, you can save a modified report template with a new name. Multiple report templates can be open on the desktop.

Report templates can be modified at run time to filter the data based on the date(s), list subsets, output styles, and/or data source. You can configure filter lists that will include a subset of the available records in the report. The state of each filter list is stored as part of the report template. If an open report template has been modified and then a new report template is selected, you will be prompted to save or discard the changes you made to the modified template.

Template Settings

Template settings include date ranges; filters or list subsets, such as drugs, fluids and surgeons; output styles, such as the designated printer or another file format; and data source.

Date Ranges

The included database entries can be restricted according to the *date of the entries* by selecting or specifying a date range. The following date ranges can be selected:

- All Dates
- Calendar 1st Half, Calendar 2nd Half
- Calendar 1st Qtr, Calendar 2nd Qtr, Calendar 3rd Qtr, Calendar 4th Qtr

- Last 4 Weeks To Sun(day), Last 7 Days, Last Full Month, Last Full Week, Last Year MTD, Last Year YTD
- Month To Date
- Week To Date From Sun(day), or Year To Date
- Custom

If you select Custom, the From and To fields are enabled and you can enter the date range for which you want to generate the report.

Filters or List Subsets

The included cases can be restricted according to the *contents of fields* by selecting or specifying the items to be included. Report Manager will present you with all the items from certain site lists. You can select a subset of the list for the report template. You can also select whether the list is based on the entire value set of the list, or only on the subset that has been marked “active” in List Manager. The following item lists can be selected:

- Drugs
- Fluids
- Procedures
- Surgeons
- Anesthetists
- Anesthesia Types
- ASA Physical Status Number
- Operating Room Number
- Outcomes
- Events

Output Styles

You can select any of the following report output destinations:

- Print preview
- Default printer

Data Source

The data source is the periopdm database ODBC source. This source is configured at installation time and refers to a remote Saturn database server.

4

Creating Templates and Generating Reports

Generating a Report from a New Template

If you want to create a new template, you can do so by selecting a report description. Report descriptions are the different types of reports that you can run that are provided by Draeger Medical, Inc. You can customize the settings and rename it, thus creating a “new” template.

Prerequisite You must be logged on to Report Manager.

Procedure Follow these steps to run a report after you create a new template.

1. When you open Report Manager, the Main window appears (Figure 4-1).

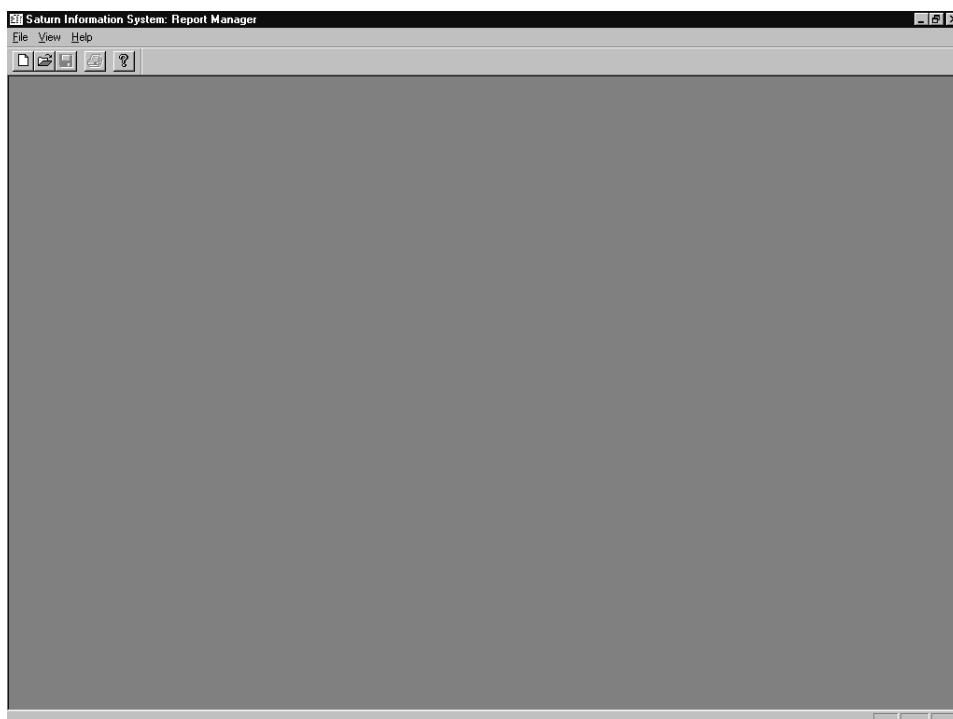


Figure 4-1. Main Window

2. Select New from the File menu or the toolbar. A blank report template appears (Figure 4-2).

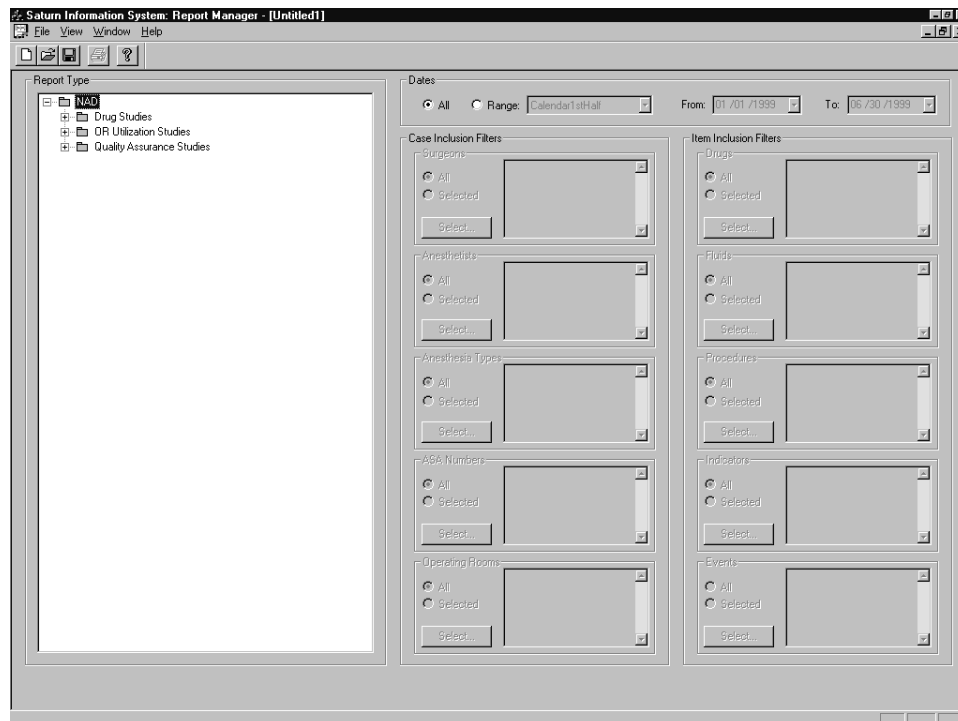


Figure 4-2. New Report Template

3. Double-click or select the folder (by selecting the plus (+) sign) which contains the report type you want to generate (i.e., Drug Studies, OR Utilization Studies, etc.) A list of report descriptions appears. The list of report descriptions for the OR Utilization Studies folder is shown in Figure 4-3.

4

Creating Templates and Generating Reports

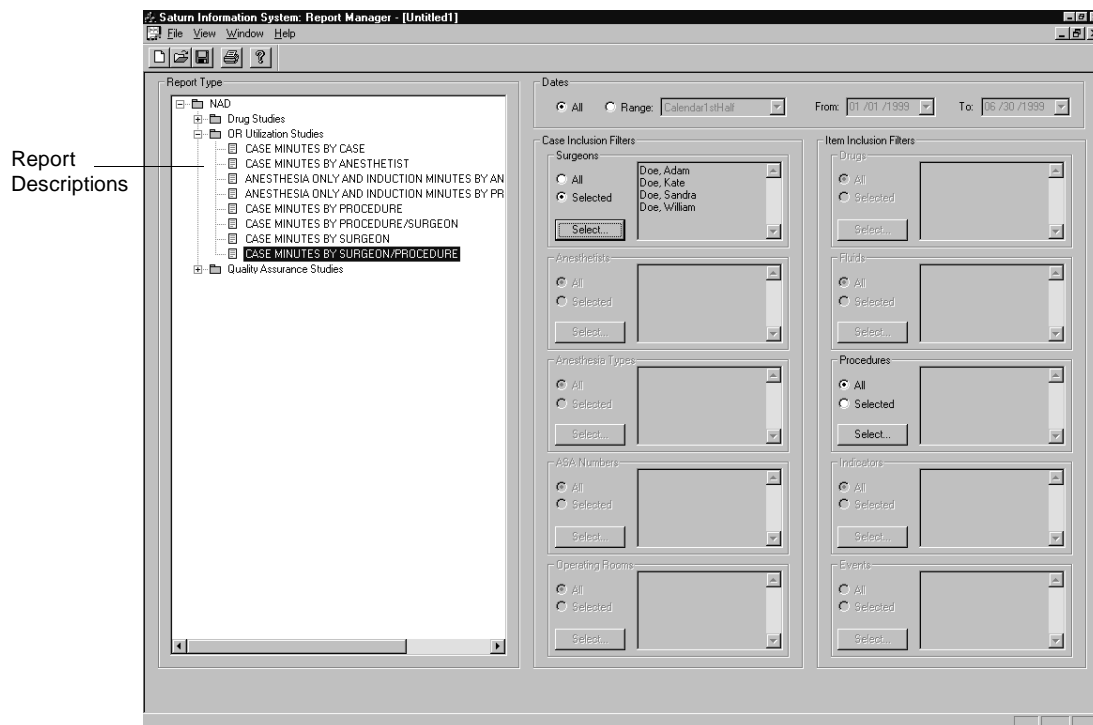


Figure 4-3. Report Descriptions (OR Utilization Studies Folder)

4. Click or select the report description you want to use as the basis for the new template. The “Case Minutes By Surgeon/Procedure” report description is selected in Figure 4-3.
5. To make selections for the new template, proceed to step 6 in “Generating a Report from an Existing Template” on page 4-7.

Generating a Report from an Existing Template

Follow these steps to generate a report using a report template that you have already created and saved. These steps also include modifying the existing template.

Prerequisite You must be logged on to Report Manager.

Procedure Follow these steps to run a report from an existing template.

1. When you open Report Manager, the Main window appears (Figure 4-4).

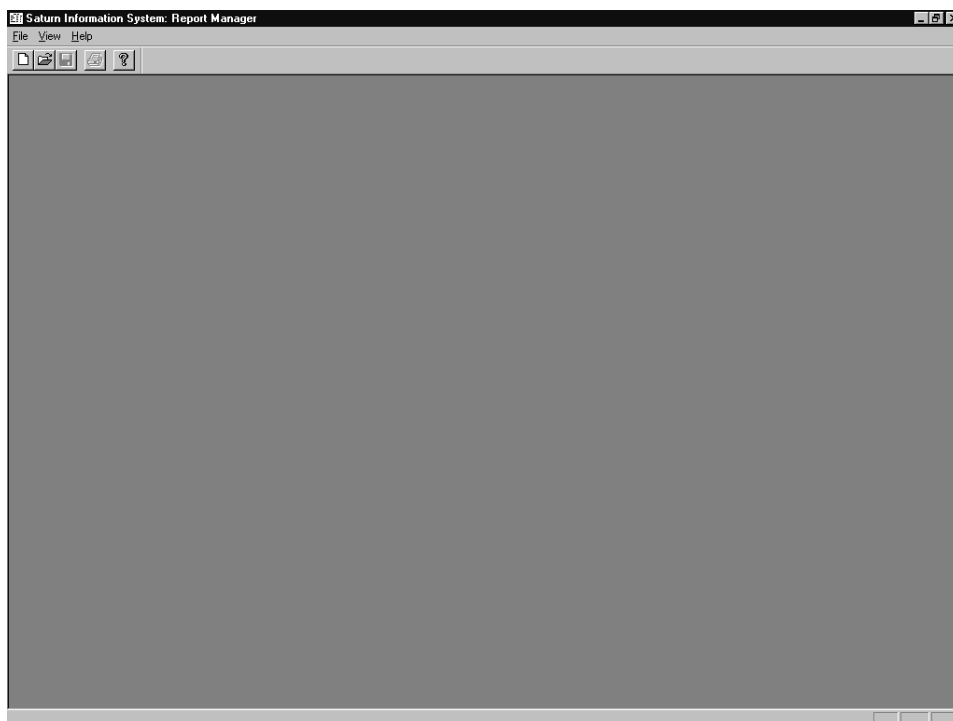


Figure 4-4. New Report Template

2. Select Open from the File menu or the toolbar to open an existing template.

A Windows Open dialog box appears, which lets you navigate to the folder on your network that contains the template you want to open (Figure 4-5 on page 4-8).

3. Select the drive and folder(s) where your report templates are located until they appear in the Look in window in the Open dialog box. Figure 4-5 is an example.



Figure 4-5. Finding the Report Template Folder (Example Only)

In the example in Figure 4-6, the Fiscal2000 folder is selected, displaying the available templates (Custom1, Custom2, and Custom3).

Note: When you create new templates, they are automatically given an .srf file name extension.

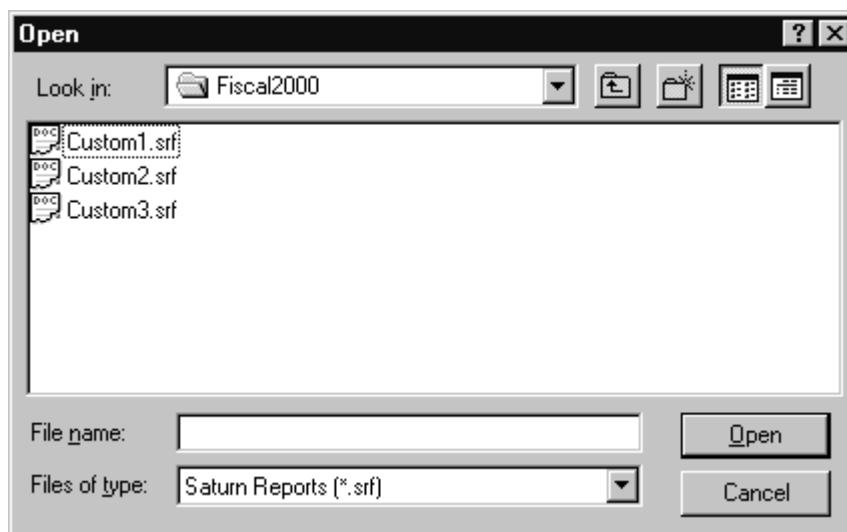


Figure 4-6. Opening the Template Folder to Select the Template (Example Only)

4. Double-click or select the template in the Look in window that you want to use to generate the report (Figure 4-6). The report template screen appears (Figure 4-7), with the Settings button(s) for that report type enabled and the settings made previously now appearing in the Case Inclusion Filters and Item Inclusion Filters areas of the screen. The report description folders and files (i.e., the Draeger templates) appear in the Report Type area of the screen.

Example: In Figure 4-7, the “Custom1” template settings are displayed in the ASA Numbers (4) and Operating Rooms (OR 3) sections of the Case Inclusion Filters area.

Note: To customize or change the settings in this template, continue with the following steps. If you do not want to customize or change the template, proceed to “Previewing a Report” on page 4-15.

5. If the report description folders are not open, do so by clicking the plus (+) signs to display the list of templates. Click or select a different report description if you want to add new or different data to this report. Different settings in the Report Manager window will become active. The areas of the template that are dimmed do not apply.

Note: If you want to change the settings that already appear on the screen (i.e., ASA Numbers and Operating Rooms in Figure 4-7), you must select the report description in the Report Type window originally used as the basis for this template (i.e., “Case Minutes By Case”) to enable the Settings buttons.

Report Manager lets you save the template with the new settings (overwriting the original template), or save the settings as an entirely new template with a new name.

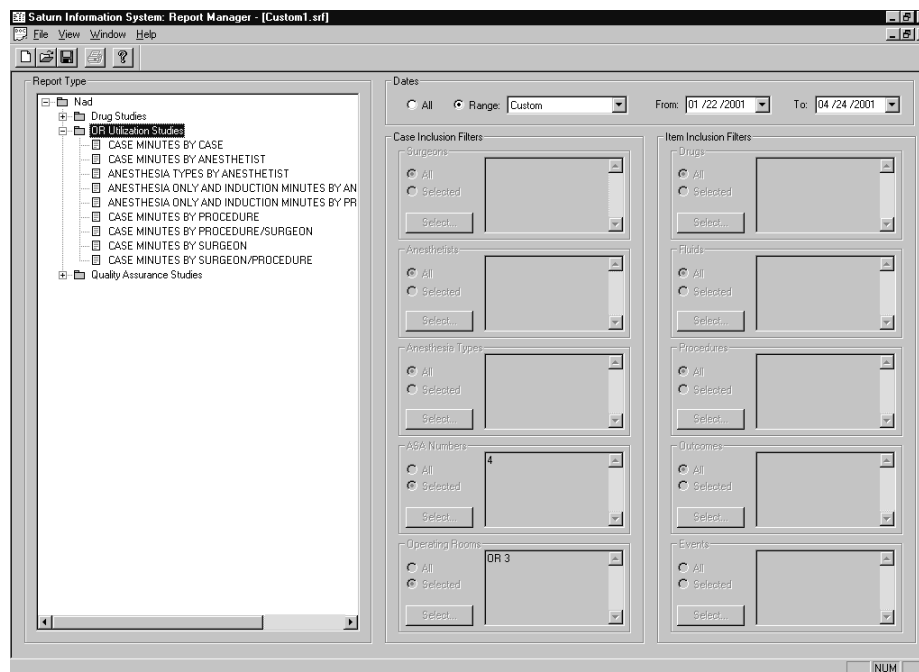


Figure 4-7. Opened Report Template

4

Creating Templates and Generating Reports

6. Select the date range for the report by selecting the All or Range option button in the Dates area. (If you selected the All option button, go to step 9.)
7. If you selected the Range option button, click the Date Range box and select the time period for which you want to generate the report (Figure 4-8).

Note: If you selected the Custom option in the Range box, proceed to step 8. If you selected any other option in the Range box, proceed to step 9.

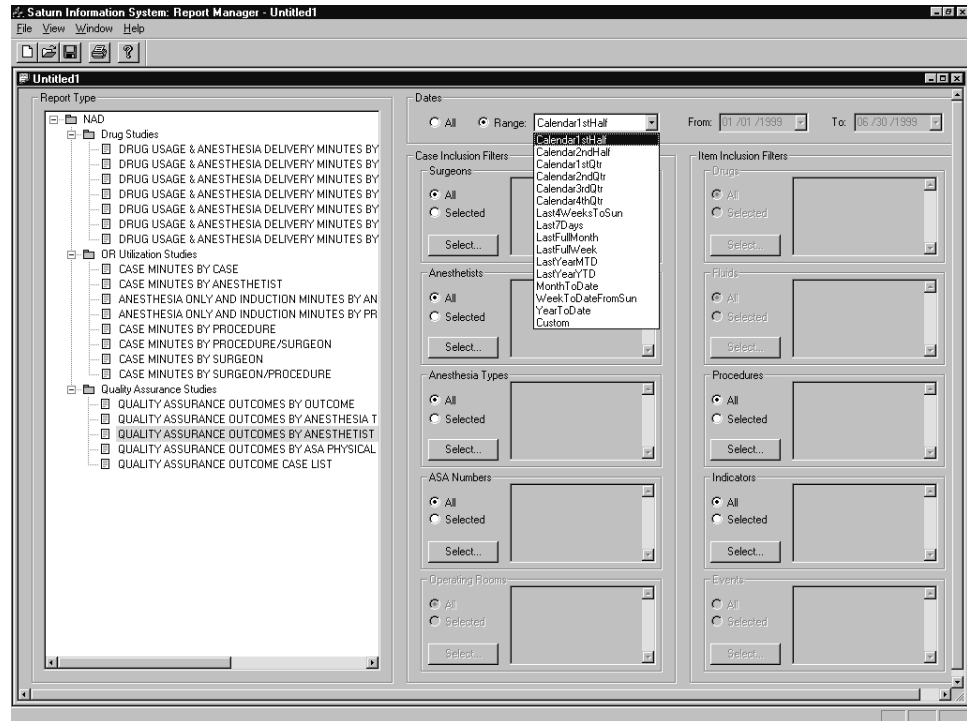


Figure 4-8. Date Range Box

8. When you select Custom in the Range box (Figure 4-9) you must select your own dates in the From and To boxes. The From and To boxes provide you with a drop-down calendar (Figure 4-9).

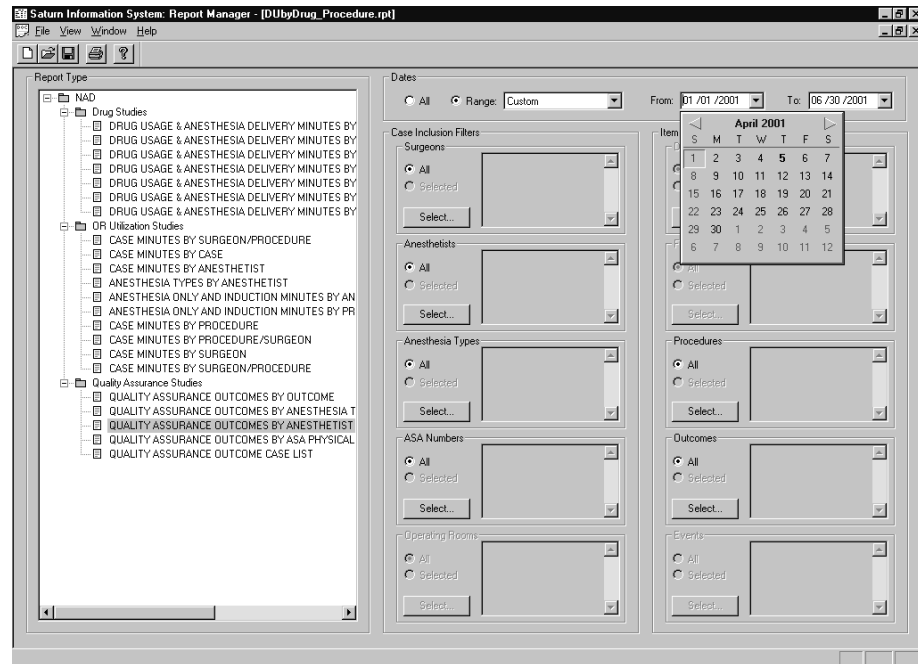


Figure 4-9. Date Range Drop-down Calendar

On the drop-down calendar in the From box, click the right-arrow button to display the next month; click the left-arrow button to display the previous month.

When the desired month and year is displayed, click the start date on the calendar. The calendar disappears from view.

Repeat the above using the drop-down calendar in the To box to select an end date for the range in the To box.

9. For each area to be modified in the Case Inclusion Filters and Item Inclusion Filters areas, press the Select button. A list of all available items (originally selected in the List Manager program) appears in a dialog box (Figure 4-10).

Note: Depending on the template you selected, various settings in the Case Inclusion and Item Inclusion Filters areas will be selectable (made active) on the screen. Settings you cannot change in this template are dimmed.

Example: If you selected the “Case Minutes by Surgeon/Procedure” report description, you will be able to select or delete surgeons from the *Surgeons* area as well as procedures from the *Procedures* area. All other areas will not be available for changes.

In the example below (Figure 4-10), choose or delete items by selecting or clearing the check boxes in the list. Then select the OK button to save your choice(s). Repeat for each area to be modified.

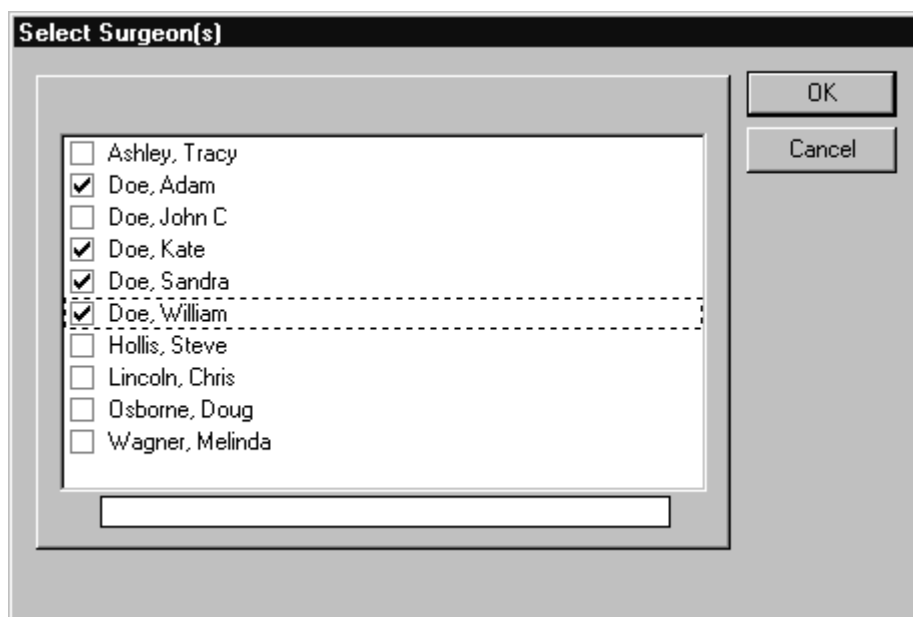


Figure 4-10. Selecting Surgeon(s)

10. To generate the report without saving the template you just modified, proceed to “Previewing a Report” on page 4-15.

To save the modified template, go to the next section.

Saving a Report Template

When you create or modify a template, you must save it to retain it (i.e., templates are not saved automatically). You can save a new report template after you have created it, or you can save an existing report template after you have modified it. Saving a report template causes Report Manager to write all of the settings for the active report template to a Saturn report template file (file extension .srf). These templates can be used to generate future reports that can be viewed in word processors, spreadsheets or browsers. The templates can be saved in any directory to which you have access rights.

Note: You can also save the reports you generate. For more information, see “Exporting a Report” on page 4-16.

Saving New Templates

When you save a new report template, Report Manager performs the Save As function and prompts you to name it. (The report is regenerated using the report template. This is the same as if you had selected the Save As option from the File menu.) The Save As dialog box appears. You can enter a new name for the report template, or select one from the list. If you select an existing name, Report Manager prompts you to overwrite the existing template.

Prerequisite

A report template must be open before you can save it.

Procedure

Follow these steps to save a new template or an existing template (to rename it).

1. Select Save As from the File menu. The Save As dialog box appears.

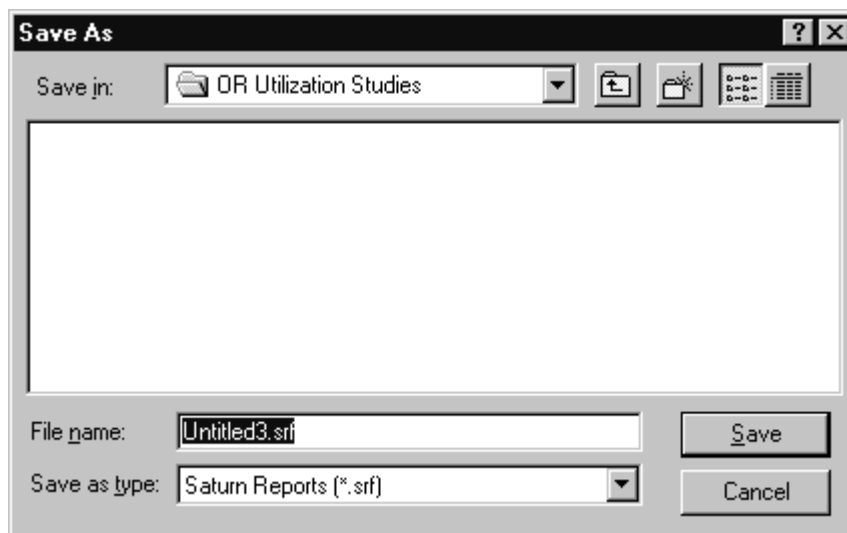


Figure 4-11. Save As Dialog Box

2. Select a folder in the Save in list.

Note: Select a folder for which you have security clearance and can access on the network.

3. Type a file name in the File name box.
4. Select the Save button, or select Cancel to start over.

4

Creating Templates and Generating Reports

Saving Existing Templates

You can save a report template by selecting Save from the File menu or the Save button on the toolbar. Since settings are not saved automatically, you must use the Save function.

Note: If you are changing the settings of an existing template and you save it by selecting Save from the File menu (or on the toolbar), the old settings will be overwritten. To rename the file so that the old template settings are not overwritten, see "Saving New Templates" on page 4-13.

Procedure

Follow this step to save an existing template (that has been modified) without renaming it:

From the File menu, select Save.

–Or–

On the toolbar, select the Save button.

–Or–

On the keyboard, type ALT, F, S.

Previewing a Report

Selecting Print Preview from the File menu actually generates the report. You must select this option before you can export a report. Report printouts or files cannot be generated during a network or server failure.

Prerequisites

Make sure you have made any changes or modifications to the template prior to generating the report.

Procedure

Perform the following steps to preview a report.

1. Select Print Preview from the File menu. The report is generated and appears in a preview window on the screen. (Figure 4-12).

Surgeon Name	Procedure Name	Number of Cases	Average Case Minutes	Average OR Minutes	Average Delivery Minutes	Average Surgery Minutes
ALL Cases						
ANESTH, ANKLE ARTHROSCOPY (01464)		2				
ANESTH, ANKLE REPLACEMENT (01456)		1	172	187	01	124
ANESTH, CHEST DRAINAGE (00374)		1				
ANESTH, CHEST TUBING TIPS (00377)		2				
ANESTH, CHEST SURGERY (00340)		1				
ANESTH, EAR EXAM (00134)		1				
ANESTH, EAR SURGERY (00138)		1				
ANESTH, KNEE AREA SURGERY (01360)		1				
ANESTH, KNEE AREA SURGERY (01370)		1				
ANESTH, KNEE ARTHROSCOPY (01373)		3				97
ANESTH, LOW INTESTINE SCOPE (00310)		1				
ANESTH, LOWER ARM PROCEDURE (01250)		1				
ANESTH, LOWER ARM SURGERY (01250)		2		110		53
ANESTH, LOWER ARM VEIN SURG (01250)		1				
ANESTH, LOWER LEG CASTING (01490)		2				
ANESTH, LOWER LEG DISFRACTURE (01913)		1				
ANESTH, LOWER ARM ARTERY SURG (01240)		1				
ANESTH, FACELIFT (00330)		1				
ANESTH, PELVIS NERVE REMOVAL (01120)		1				
ANESTH, PELVIS PROCEDURE (01160)		1		120		104
ANESTH, PELVIS SURGERY (01160)		1	82		90	40
ANESTH, SPINE, CORD SURGERY (00530)		1				
ANESTH, SURG LOWER ABDOMEN (00540)		1				
ANESTH, SURGERY OF BREAST (00400)		1				
ANESTH, SURGERY OF SHOULDER (01630)		1				
ANESTH, UPPER ARM PROCEDURE (01720)		1	126			117
Total for all Surgeons:		34	142	136	97	95
RAD, RAD RAD						
ANESTH, EAR SURGERY (00138)		1				
ANESTH, LOWER ARM ARTERY SURG (01240)		1				
PERCE EARLOBES (00090)		1				
Total for all Surgeons:		3				
Total for all Surgeons:		37	142	136	97	95

Figure 4-12. Print Preview

Note: An "Executing report" message appears prior to the report being displayed on the screen. The more variables selected for the report, the longer this message is displayed on the screen.

2. In the size box, type or select the size of the report (i.e., the percentage) as you want it to appear on the screen. If you type the size on the keyboard, you must press ENTER.
3. Press the Saturn icon in the status bar to return to the report template screen.

Exporting a Report

You can export and save a report in another file format, such as an Excel spreadsheet, HTML file, or Lotus 1-2-3 work sheet.

Prerequisite

You must have generated a report before you can export it and save it to another file format. See “Previewing a Report” on page 4-15 for details.

Procedure

Follow these steps to export a report and save it in another file format.

1. On the Print Preview screen, press the Export button (Figure 4-12 on page 4-15). The Export dialog box appears (Figure 4-13).

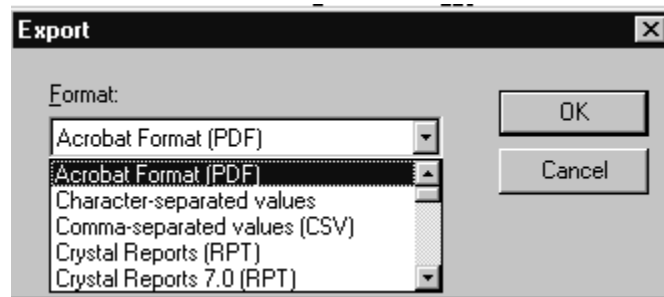


Figure 4-13. Export Dialog Box

Note: Selecting the Export button from within the Print Preview displays the Crystal Reports Export dialog box, which enables you to select a format and destination for the report. When you export a report to a different file format other than a Seagate Crystal Reports format (i.e., RPT file extension), you may lose some or all of the formatting that appears in your report. The program attempts to preserve as much formatting as the export format allows.

2. In the Format list, select a file format.
3. In the Destination box (behind the drop-down list in Figure 4-13), select a location where you want to save this file.
4. Press OK. The Choose Export File dialog box appears.

Note: Other dialog boxes may appear before the Choose Export File dialog box, depending on your choices in steps 2 and 3.

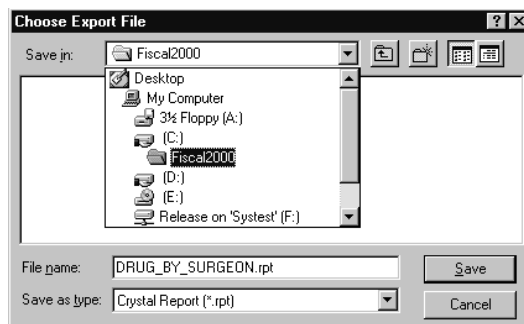


Figure 4-14. Choose Export File Dialog Box

5. Go to the folder where the exported report data is to be saved, then type a file name in the File Name box and press the Save button. Or, to keep the original file name, just press Save.
6. Press the minimize button to return to the Report Manager window.

Printing a Report

You can print a report while you are in the Print Preview option by pressing the Print button (Figure 4-12 on page 4-15), or you can print a report anytime by selecting Print from the File menu.

Prerequisite You must have generated a report before you can print it. See “Previewing a Report” on page 4-15 for details.

Procedure Follow these steps to print a report from within the Print Preview option or from the File menu.

Note: You can select a different printer if you print from the File menu.

1. Select the Print button from within the Print Preview option (Figure 4-12 on page 4-15) to print the report. The Crystal Reports Print dialog box appears (Figure 4-15).

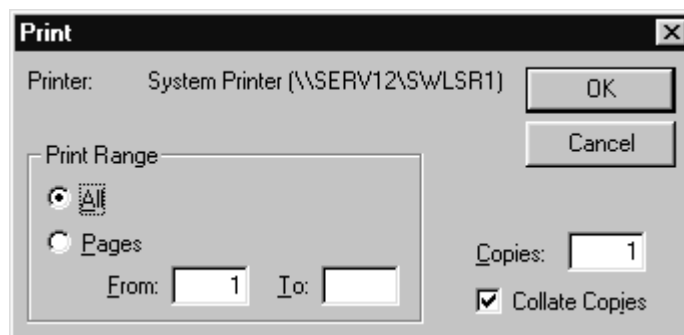


Figure 4-15. Crystal Reports Print Dialog Box

–Or–

On the File menu, choose Print.

–Or–

On the toolbar, select the printer icon.

The Windows Print dialog box appears (Figure 4-16 on page 4-18).

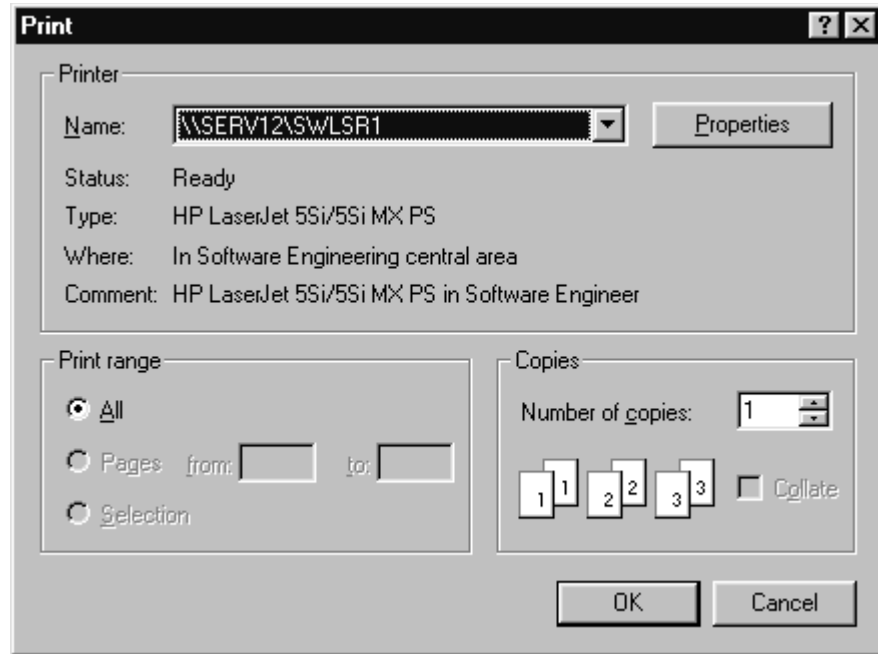


Figure 4-16. Windows Print Dialog Box

2. Select the print range and the number of copies you want to print.
3. Press OK. The report is printed to the designated printer (Figure 4-17).

Saturn Information System					
Page 1 of 1					
CASEMINUTES BY SURGEON #& PROCEDURE					
All Dates					
Surgeon Name/Procedure Name	Number of Cases	Average Case Minutes	Average OR Minutes	Average Delivery Minutes	Average Surgery Minutes
< Surgeon >					
ANESTH, ANKLE ARTHROSCOPY (01464)	2				
ANESTH, ANKLE REPLACEMENT (01480)	2	172	157	61	134
ANESTH, CHEST DRAINAGE (00514)	1				
ANESTH, CHEST LUNG BIOPSY (00512)	2				
ANESTH, CHEST SURGERY (00540)	1				
ANESTH, EAR EXAM (00124)	1				
ANESTH, EAR SURGERY (00120)	1				
ANESTH, KNEE AREA SURGERY (01300)	1				
ANESTH, KNEE AREA SURGERY (01392)	1				
ANESTH, KNEE ARTHROSCOPY (01382)	3				57
ANESTH, LOW INTESTINE SCOPE (00210)	1				
ANESTH, LOWER ARM PROCEDURE (01820)	1				
ANESTH, LOWER ARM SURGERY (01830)	2		110		85
ANESTH, LOWER ARM VEIN SURG (01850)	1				
ANESTH, LOWER LEG CASTING (01490)	2				
ANESTH, LUMBAR DISKOGRAPHY (01912)	1				
ANESTH, LWR ARM ARTERY SURG (01840)	1				
ANESTH, PACEMAKER INSERTION (00530)	1				
ANESTH, PELVIS NERVE REMOVAL (01180)	1				
ANESTH, PELVIS PROCEDURE (01160)	1		120		104
ANESTH, PELVIS SURGERY (01120)	1	82		50	40
ANESTH, SPINE, CORD SURGERY (00630)	1				
ANESTH, SURG LOWER ABDOMEN (00840)	1				
ANESTH, SURGERY OF BREAST (00400)	1				
ANESTH, SURGERY OF SHOULDER (01630)	1				
ANESTH, UPPER ARM PROCEDURE (01730)	1		136		117
Total for this Surgeon:	34	142	136	57	96
FAD, FAD FAD					
ANESTH, EAR SURGERY (00120)	1				
ANESTH, LWR ARM ARTERY SURG (01840)	1				
PERCE EARLOBES (69090)	1				
Total for this Surgeon:	2				
Total for all Surgeons:	36	142	136	57	96
Saturn Information System Copyright (c) 1997-2001 Drogos Medical, Inc					
CPT only (c) 2000 American Medical Association. All Rights Reserved. Applicable RAR/DPA/BS Revisions Apply to Government Use					

Figure 4-17. Example Printed Report

Deleting a Report Template

To delete a report template, use the Windows Explorer Delete function or the DOS Delete function.

4

Creating Templates and Generating Reports

5

Last Steps with Report Manager

This section explains how to exit Report Manager.

Exiting Report Manager..... 5-2

Exiting Report Manager

When you have finished creating and modifying report templates, saving your changes and printing your reports, you can exit Report Manager.

Procedure

1. To exit Report Manager, follow the procedure for the input device you are using:

Mouse	Double-click the Control menu icon on the title bar (Figure 5-1). Or, click the File menu and then click Exit.
Keyboard	Type ALT, F to select the File menu, then type E to select Exit from the File menu.



Figure 5-1. Control Menu Icon

2. If any report templates are open with unsaved data when you try to exit Report Manager, you are prompted to save the data for each report template before it is closed, as shown in Figure 5-2 below.
 - If you press Yes, data will be saved for the specified report template.
 - If you press No, the changes will be discarded.
 - If you press Cancel, the report template will remain open but the exit request will be cancelled.

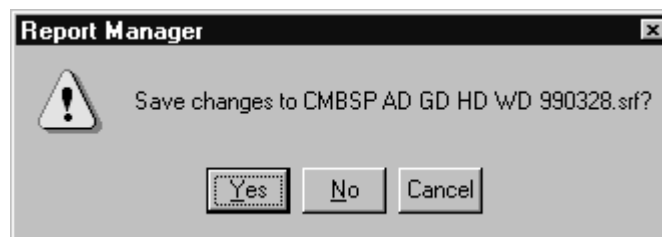


Figure 5-2. Exit Save Prompt

3. After you press Yes or No for each open report template, Report Manager closes.

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Web: www.draegermedical.com
Printed in the U.S.A.